

Multi-Purpose Projects

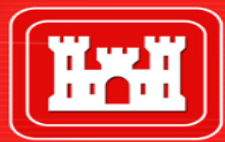
Module M4: Telling the Plan
Formulation Story



Student Learning Objectives

The Student will be able to:

- Identify a report's audience.
- To list some characteristics of a GREAT report.



TELLING THE PLAN FORMULATION STORY

- When you “finish” Plan Formulation and Select the “Recommended Plan”, **Your Job’s Still Not Done**
- If You Produce a Good Report That Clearly lays out what you did, You make it much easier for the decision makers to agree and support the recommendation



TELLING THE PLAN FORMULATION STORY

- You must be able to clearly relate:
 - Who?
 - What?
 - Where?
 - When?
 - Why?
 - How?



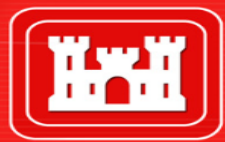
TELLING THE PLAN FORMULATION STORY

- Audience
- Content



WHO READS THE REPORT?

- Who's your intended audience?
- Who *really* reads the *entire* report?
- What are important sections of the report?



WHO'S YOUR INTENDED AUDIENCE?

- Project Delivery Team, Vertical Team, and the Sponsor
- Independent Technical Reviewers
- Stakeholders, Publics, Agencies, Groups, Tribes, etc.
- Higher Authority—MSC's & HQ
- ASA(CW), OMB, Congress
- Others, such as Individuals



WHAT ARE THE CONCERNS OF READERS?

- PDT, VT, Sponsor — Report & EIS that Leads to Project Implementation
- IT Reviewers — Portions Dealing with Their Technical Expertise
- Stakeholders -- Portions Dealing with Their Concerns
- Publics — Recommended Plan & Adverse Impacts of Interest to Them
- Agencies — Impacts on Resources Under their Authority
- Groups — Impacts on Factors of Concern to Them



WHAT ARE THE CONCERNS OF READERS?

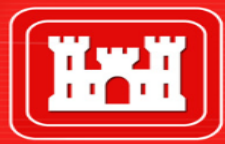
- Tribes — Impacts on Resources Affecting Tribal Land and Activities
- Corps Higher Authority — Compliance with Applicable Laws and Policies
- ASA(CW) and Office of Management & Budget — Compliance with the Program of the President
- Congress — Helping Constituents Solve Their Water Resources Problems
- Others — such as Individuals With Personal Interests



WHAT ARE IMPORTANT PARTS OF THE REPORT?

- Executive Summary
- Conclusions
- Recommendations
- The “real” decision makers often only read these portions of the report
- These parts must be short, clear, and tell the story.

The remainder of this discussion will focus on the main report. Generally, let the technicians write the appendices, but be sure to check for consistency.



HOW LONG SHOULD THE FEASIBILITY MAIN REPORT BE?

- _____ 0-25 pages.
- _____ 26-50 pages.
- _____ 51-100 pages
- _____ more than 100 pages?
- _____ 10 Kg paper?



What About the Rest of The Report?

EXHIBIT G-7 - FEASIBILITY REPORT CONTENT (ER 1105-2-100)

- 1. Study Authority.
- 2. Study Purpose and Scope.
- 3. Concise Discussion of Prior Studies, Reports and Existing Water Projects.
- **4. Plan Formulation.**
- 5. Description of the Selected Plan.
- 6. Plan Implementation.
- 7. Summary of Coordination, Public Views and Comments.
- 8. Recommendations.



Where Can You Get Help on Report Format?

“MODEL REPORTS”

- 905(b) Analysis
- PMP (Project Management Plan)
- Integrated Feasibility Report

www.usace.army.mil/CECW/PlanningCOP/

Click on “Planner’s Library” and planning templates

See also the Publications Website at IWR

www.iwr.usace.army.mil



WHAT MUST BE CLEARLY EXPLAINED?

- How Did You:
 - Identify Problems and Opportunities.
 - Develop Planning Objectives and Constraints.
 - Determine Existing and Without Project Condition
 - Screen Measures to Create Alternatives
 - Evaluate & Compare Alternatives
- Why Did You:
 - Reformulate
 - Select the Recommended Plan



ITEMS OFTEN NOT CLEARLY EXPLAINED

- How were the Planning Objectives & Constraints used to develop Measures?
- What strategies were used to combine Measures into Alternatives?
- What Criteria were used to screen Measures and Alternatives?
- How did the screening develop the Final Array of Alternatives?
- How does the Final Array of Alternatives respond to the Planning Objectives and Constraints?
- What are the important trade-offs between the Alternatives in the final array?
- Why is a given plan the Recommended Plan?



TIPS TO CREATE GREAT REPORTS

- Keep the PDT on track and involved – don't spend extensive study dollars doing detailed analysis of dead end alternatives.
- Be aware. Technical support staff is generally uncomfortable with providing estimates of limited detail.
- Don't downplay O&M cost estimates. They can have a big impact on total annual costs and net annual benefits.
- Explain all influences that played a role in identifying plans to carry forward to the next level.



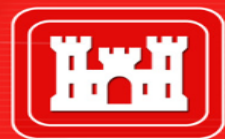
TIPS TO CREATE GREAT REPORTS

- Write down your decisions as you go.
- Better yet, write the plan formulation portion of the report as you go.
- The formulation story should track, with no “leaps of faith”
- Resource Agency involvement throughout the process.
- Keep the Local Sponsor engaged in the report development process.



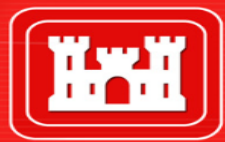
TIPS TO CREATE GREAT REPORTS

- Don't re-invent the wheel. Use a good report as a template.
- Avoid Fancy Fonts. Report should be clearly legible. (**The most important readers may be over 50!**)
- Use relatively easy-to-read language.
- Tables, graphs, and charts are the preferred methods for providing similar data and easy comparison.
- Some color is useful, but avoid extensive use of color. Tables and figures can remain grayscale with no degradation in quality.
- For authorization reports, be prepared to produce a purely black and white print copy of the report.
- Level of Analysis Detail should parallel formulation process.



TIPS TO CREATE GREAT REPORTS

<i>Point in Formulation Process</i>	<i>Suggested Level of Design Detail</i>
905(b)	Purely Conceptual -- An idea, investigated sufficiently to determine merits and possible Federal Interest.
Preliminary Screening	Broad Assumptions utilizing experiences of the PDT - Keep those that make sense. Eliminate the obvious.
Array for Evaluation	First use of estimated quantities, with focus on major cost controlling features
Final Array, Optimization	Continued Refinement, identifying additional details
Recommended Plan	Feasibility level, as defined in ER. Must support Cost Estimate appropriate for a decision document



**Now that you have endured a week
with us discussing Plan
Formulation.....**

**Go Forth
Formulate Great
Projects
Write Great Reports**